



## STATEWIDE MARKETING, EDUCATION, AND OUTREACH WORKSHOP AGENDA (A.12-08-007)

Date: January 12<sup>th</sup> 2017

9:30 AM to 4 PM

Location: CPUC Auditorium, 505 Van Ness Avenue, San Francisco, CA 94102

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|--------------|--|----------------------|
| <b>I.</b>    | <b>Welcome:</b>  | <b>9:30 - 9:45</b>   |
|              | Commissioner Carla Peterman  |                      |
| <b>II.</b>   | <b>Today's Purpose:</b>  | <b>9:45 - 10</b>     |
|              | Michael Shue, <i>Executive Vice President, DDC</i>                       |                      |
| <b>III.</b>  | <b>Research Findings to Date:</b>  | <b>10 - 11:15</b>    |
|              | Matt Perry, <i>Group Business Director, DDB</i>                          |                      |
|              | Meghan Tetwiler, <i>Associate Strategy Director, DDB</i>                 |                      |
| <b>IV.</b>   | <b>Break</b>   | <b>11:15 - 11:30</b> |
| <b>V.</b>    | <b>ME&amp;O Five Year Plan Presentation:</b>                             | <b>11:30 - 12:30</b> |
|              | Michael Shue, <i>Executive Vice President, DDC</i>                       |                      |
| <b>VI.</b>   | <b>Lunch Break</b>   | <b>12:30 - 1:30</b>  |
| <b>VII.</b>  | <b>Structured Discussion of ME&amp;O Five Year Plan:</b>                 | <b>1:30 - 3</b>      |
|              | Michael Shue, <i>Executive Vice President, DDC</i>                       |                      |
| <b>VIII.</b> | <b>Review IOU Priorities Moving into and Beyond 2017:</b>                | <b>3 - 4</b>         |
|              | Rory Cox, <i>Analyst, CPUC Energy Division, Energy Efficiency Branch</i> |                      |

**Description:** Proceeding A.12-08-007 is providing direction to the Statewide Marketing, Education and Outreach program known as "Energy Upgrade California." Decision 16-03-029, from September, 2016, states "...we endorse and establish a collaborative, record-based process to be followed by the statewide implementer, local program administrators, and other stakeholders to develop the five-year ME&O Strategic Roadmap and Annual Joint Consumer Action Plans. ... We direct the statewide implementer and other stakeholders to ensure that this process results in final "deliverables" including (1) revised strategies to implement the adopted short- and long-term goals of the program; (2) revised measurable objectives to determine success in implementing the strategies; (3) specific metrics to be used to evaluate the progress and success of the program; and (4) the five-year Strategic Roadmap and the first Annual Joint Consumer Action Plan."

A competitive RFP process led to the selection of DDB as the implementer for Statewide ME&O as of January 1, 2017.

On November 29, 2016, the CPUC held an initial workshop to present evaluation results, and to initiate a discussion regarding vision, strategies, objectives, and metrics for the program. The focus of the January 12, 2017 workshop will be the development of the 5 year Strategic Roadmap and the integration between statewide ME&O and that implemented by program administrators. This will be followed by a third workshop on February 8, 2017, to discuss the 1 year Joint Consumer Action Plan.



**Remote access**

<https://van.webex.com/van/j.php?MTID=m921d975dcce6da5a49124ed5c08f0cf6>

Meeting number: 743 938 692

Meeting password: !Energy1

Call in: 866-642-1440

Participant passcode: 751-6937